National Aeronautics and
Space Administration

Ames Research Center
Moffett Field, California 94035

Electronic Purchase Request System
Quick Reference Card

• Initiators' Instructions •

Business Systems Office

Version 2.0

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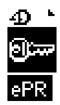
This document was written by staff from Recom Technologies (contract NAS2-13959) under the technical direction of the Business Systems Office.

What is ePR?

The Electronic Purchase Request **(ePR)** system is a computerized alternative to using the paper version of Ames' purchase request form (ARC 31). Currently, this system allows users to fill out, submit, and track electronic purchase requests using their Macintosh computers.

Logging On

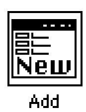


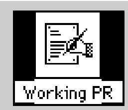
1. Double-click the **ePR** icon.
2. Type your password.
3. Click **Connect**.

- Once you've logged on, you see the **ePR** logo screen.
- Your password is case-sensitive. Be sure to type it exactly.
- To enter a new password, choose **Change Password** from the File menu.
- To keep your password secure, choose a password that consists of both letters and numbers. Also, don't choose an obvious password, such as your first or last name.

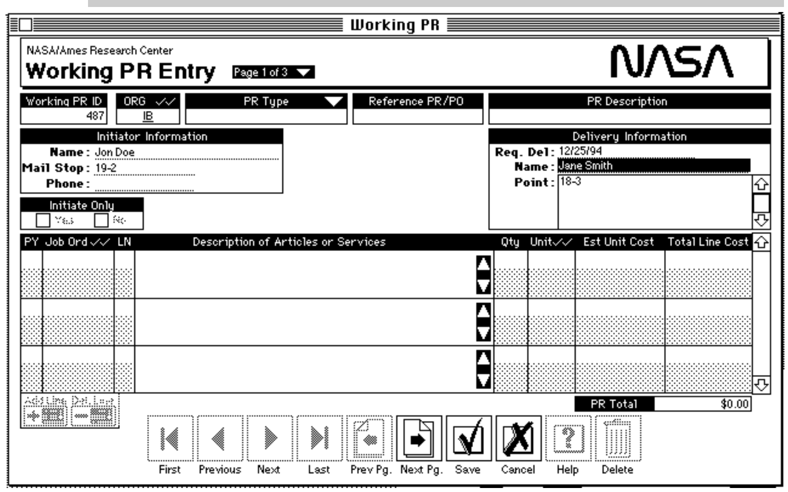
Opening a New PR

1. Choose **Working PR** from the PR Menu.
2. Click **Add** to display a Working PR Entry form.





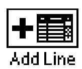
- You can click **Working PR** on the icon palette instead. To see the icon palette, choose **Show Palette** from the PR Menu.
- When you open a new PR, preference entries appear for ORG, Initiator Information, and Delivery Information. You can type over these entries on the Working PR Entry form.
- To change the preference entries for all new PRs, choose **Preferences** from the File menu and type over the entries.



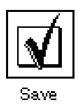
Section for entering line items

Filling Out a PR

1. Select a PR type, and type a reference PR/PO and a PR description in the blocks at the top of the form.
2. Make any changes to the preferred entries on the top half of the form.
3. Move the cursor to the section for entering line items and click **Add Line**.



4. Type information for the line items you want to order.
5. Fill in information (page 2) and check appropriate boxes (page 3).
6. Click **Save**.



- Although the electronic PR form looks different from the paper version, it lets you enter the same information. Better yet, the electronic PR tells you when you made an error or omitted information.
- You can move among input blanks by using your mouse or by pressing the **Tab** key.
- For PR Type, the list arrow lets you choose from a list of acceptable values. 
- For ORG, Job Order, and Unit, double check marks  allow you to click twice in the field to choose from a list of acceptable values.
- For Description of Articles or Services, the scroll arrows let you move up and down through the text. You can also use the up and down arrow keys. 
- The total cost of all items entered on the PR is calculated automatically.
- If you made any errors, a window lists them when you click **Save**. Otherwise, you see the Working PR List.
- You can save a PR with errors or warnings.

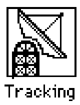
Submitting a PR

1. Choose **Working PR** from the PR Menu.
2. Select a PR from the Working PR List to submit.
3. Click **Submit**.

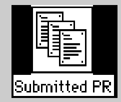
- You can click **Working PR** on the icon palette instead. To see the icon palette, choose **Show Palette** from the PR Menu.
- You can submit one or more PRs at the same time. To select consecutive PRs from the Working PR List, hold down the **Shift** key while selecting. To select random PRs, hold down the Command key (⌘) while selecting.
- If you submit all the PRs that you've created, you'll see the message "There are no selected records for: Working PR."
- You can submit a PR with warnings but not errors.

Tracking a Submitted PR

1. Choose **Submitted PR** from the PR Menu.
2. From the PR List, select a PR you want to track.
3. Click **Tracking**. You see the PR Routing History screen.



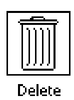
- You can click **Submitted PR** on the icon palette instead. To see the icon palette, choose **Show Palette** from the PR Menu.



- You can track one or more submitted PRs at the same time. To select consecutive PRs from the PR List, hold down the **Shift** key while selecting. To select random PRs, hold down the Command key (⌘) while selecting.
- The PR Routing History screen indicates who needs to approve the PRs, the dates they were available for review, and the dates they were approved or rejected.

Canceling a Submitted PR

1. Choose **Submitted PR** from the PR menu.
2. Select a PR from the PR List to be canceled and click **Delete**.



3. Click **OK** on the Delete confirmation window.
4. If you want the PR copied to your Working PR List, click **OK** on the next confirmation window. You can then make changes and resubmit it.
5. Inform the appropriate civil service approvers in your organization (e.g., branch chief, technical assistant) of the canceled PR.

- You can click **Submitted PR** on the icon palette instead. To see the icon palette, choose **Show Palette** from the the PR Menu.
- You cannot cancel a PR after the FM Approver has approved it.
- If you copy a submitted PR to your Working PR List (step 4), the PR appears at the bottom of the list with a new working PR ID.
- Canceled PRs remain on your PR List. They have **PR Deleted** in the Next Approver column.

Duplicating a Submitted PR

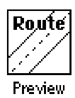
1. Click **Duplicate** on the bottom of the Working PR List.

2. Select one or more PRs on the PR Selection List of submitted PRs.
3. Click **Select.**

- Duplicated PRs appear at the bottom of the Working PR List with new working PR IDs.
- Duplicating is useful when you want to correct and resubmit a canceled PR.

Previewing Approvers for a PR

1. Select a PR on the Working PR List.
2. Click **Preview.**



- You can preview the list of approvers for a working PR before submitting it.
- If you see (Y) next to an approver’s name, the approver has been delegated approval authority.

Attaching an Enclosure to a PR

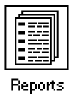
1. Select a PR on the Working PR List or a submitted PR on the PR List.
2. Click **Enclosure.**

3. Click **Add**.
4. Select a file from the list of files accessible from your Macintosh.
5. Click **Open**. You see the Enclosure Selection List window listing all of the files attached to the PR.
6. Click **Done**.

- You can add enclosures to submitted PRs, but you cannot delete them.
- To add more than one enclosure to a PR, click **Add** after completing step 5.

Creating a Report

1. Choose **PR Reporting** from the PR Menu.
2. From the PR List, select the PRs with the information you want to use for your report.
3. Click **Reports** to build a report using Quick Report Editor.



4. Drag the fields you want to see in your report from the field list box to the Quick Report layout. Drag each field to the right of existing fields in the layout.
5. Click **Print.**

- You can click **PR Reporting** on the icon palette instead. To see the icon palette, choose **Show Palette** from the PR Menu.
- To create a report of PRs with specific criteria, such as PRs within your organization, first click **Search** from the PR List to use the Search editor. Specify the search criteria, such as your organization. Then, click **Reports** and follow the steps at left.

- You can search one or more submitted PRs at the same time. To select consecutive PRs from the PR List, hold down the **Shift** key while selecting. To select random PRs, hold down the Command key (⌘) while selecting.
- If you do not have any submitted PRs in your PR List, use the search function to search other submitted PRs.
- To insert a new column in your report, select an existing column (you must click the column header to select the entire column). Then, choose **Insert Column** from the Edit menu. A blank column is inserted to the left of the column you selected.
- After clicking **Print**, you can choose to view your report on screen or print a copy.

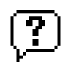
Logging Off

1. Close all windows and return to the **ePR** logo screen.
2. Choose **Quit** from the File menu.

- You may also click **Done** or **Cancel** to close windows. Depending on where you are in the system, you may have to click **Done** or **Cancel** more than once to return to the **ePR** logo screen.

Getting Help

- **Balloon help** – When balloon help is turned on (on the menu bar), "balloons" appear with help about the field the cursor is currently over. Available for most fields.



- **IB Help Desk** – Call the Help Desk at extension 46877 to get help in using **ePR** or to report problems.